

CHI 2007 Interactive Session Proposal: *Moving UX into a position of corporate influence: Whose advice really works?*

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This proposal begins with an extended version of the 4-page "extended abstract," and continues with information about the session format and logistics.

Abstract

Professionals working to move user experience (UX) into a position of corporate influence are impeded by conflicting recommendations, including those regarding the roles of documenting and evangelizing UX work, ownership of UX, organizational positioning, calculating return on investment, and conducting "ethnographic" research. In this interactive session, a group of senior UX management personnel who have moved UX into positions of rapidly increasing influence in their varied places of work debate their different perspectives and approaches to help resolve the conflicting recommendations and generate some new and improved guidance.

Setting the stage

CHI 2006 featured a management community session which painted a gloomy picture of the amount of influence user experience (UX) has in most corporations [12].

However, in-depth interviews with numerous UX management personnel as input to a course on Managing User Experience Groups [4] have revealed that some corporate UX organizations have been making great strides, giving UX rapidly increasing influence and impact in those companies.

How have these great strides been achieved? Of what have they been comprised?

Organizational challenges have been identified as the hardest and most important challenges for UX to address [1,15,20]. But, recommendations for addressing such challenges successfully have often been in conflict with each other.

Who better to debate these conflicting recommendations than a group of senior UX management personnel who have played major roles in moving UX into positions of corporate influence where they work. This session features such a group from a mix of companies where success has been achieved in ways that are similar in some cases and dissimilar in others. Session participants will debate the appropriateness of elements of their different approaches, reveal which of several past conflicting recommendations they support, and provide additional advice to session attendees to help them address the specific challenges they (are likely to) encounter in the organizations in which they work.

Attendees will be polled to reveal their views on past recommendations and will be given the opportunity to provide input throughout the debate.

Some of the conflicting recommendations

Fred Sampson begins a recently published article entitled, "Managing, just barely" [25] with the following words:

"I have a question for you: Are you the manager of a user experience design team? If you answered 'Yes,' I have another question: What were you thinking?!!!"

Obstacles galore confront UX management personnel intent on moving UX into a position of corporate influence [2,3]. And among them are some interesting conflicts between some of the key recommendations that have been offered for achieving such a goal.

Here are some of those recommendations, accompanied by a taste of the perspectives of and steps taken by the session participants of relevance to those recommendations:

Documenting & evangelizing UX work

Many have argued that explaining and advocating for UX work is a critical part of every UX professional's job. Yet, others argue that UX professionals are excessively focused on their process -- that others don't really care nor should care or will just become concerned, and that process documents end up not getting followed anyway. As Bloomer and Wolfe state (in [23]), "Teams need to avoid the role of evangelist for user-centered design."

Documenting and evangelizing UX work have played varied roles in the workplaces of the session participants. In one case, it helped show that there was rigor to the proposed work; in another case, it continues to communicate the value of the work to the business. Session participants will describe the mix of roles, large and small, such efforts have played, and debate the extent to which these efforts are important to achieving corporate influence.

Ownership of UX

Several have argued that UX professionals need to take ownership of the user experience (e.g., [5]). Others have argued that all parts of a business should own the user experience (e.g., [21]).

Session participants' views vary on this issue. In at least one case, the design is completely finished before things move onto engineering, a point after which no designing is permitted [9]. In another, ownership of the user experience is one of multiple prerequisites for group involvement [19].

Some participants argue that ownership is unrealistic and that compromise is a part of business (e.g., [16]).

A couple participants have developed user-centered design tools for other stakeholders to use. As one has said (as quoted in [7]), "We want to make customer experience everyone's business by making the process of creating experience intuitive and repeatable."

All, however, are strong proponents of collaboration with other stakeholders (e.g., [6]). And a key to all session participants' success has been building and developing a staff which is highly collaborative and which consistently exhibits related characteristics (within the constraints of the perspectives referenced above), such as being flexible and consultative and, as expressed by [16], able to "broaden their roles and better understand other stakeholders' charters."

Session participants will elaborate on their approaches and debate whether ownership of the UX by UX professionals is advisable.

Organizational positioning

Related to the issue of UX ownership is Don Norman's argument during a past CHI conference that UX personnel must strive to be treated as peers rather than resources (in [1]). A related argument was expressed during the CHI 2005 opening plenary address; referring to the multiple disciplines impacting UX, Randy Pausch stressed that "neither side can be there 'in service' of the other" [22].

The need for senior UX management positions has long been argued as critical to moving UX into a position of corporate influence (e.g., [8]), and adding a C-level executive focused on user experience is increasingly advocated these days (e.g., [24]). However, others argue that other factors are more important, such a process and organizational culture [10].

Some of the session participants' groups have moved into positions outside of technology or marketing organizations, avoiding the potential conflict of goals (e.g., [14]), while others have remained within one or the other and actually think that is fine or even best. Some session participants have achieved significant success functioning as in internal consultancy (e.g., [19]), while others have opted for most UX personnel to belong to different business units.

All but one session participant hold senior UX management positions; the other has moved from such a position to an even more encompassing position heading all of "Product" for Europe, legitimizing UX even more. Steps taken by others in the group to help legitimize UX include adding personnel to their staff who are not typically found in UX organizations; among them: market researchers, communications personnel, engineers, and program managers. The business and finance background of one session participant may have alone given UX some degree of additional

legitimacy.

Session participants will debate the value of these different approaches to organizational positioning.

Calculating return on investment (ROI)

Much has been written about the importance of analyzing ROI for UX to have influence in a corporate context. Yet, during a recent CHI conference (and elsewhere), Dan Rosenberg claimed he has never been asked for an ROI analysis in his many years in senior UX management roles, and stated that classic ROI arguments are nothing more than myths that have received general acceptance without adequate critical review [11].

One session participant has stated that "a tailored ROI model was the key to success" [14], and at the workplace of another, no UX project has ever been proposed without an ROI analysis [13].

We'll learn the relevance of calculating ROI to moving UX into a position of influence in the workplaces of the other session participants.

Role of "ethnographic" research

Many argue that increased use of ethnographic research methods greatly facilitates increasing the influence of UX -- enabling UX to play a strategic role in ideation, innovation, and planning. Indeed, some of the session participants have found this to be true (e.g., see [7] and [17]).

However, ethnographic research has been less of a focus for other session participants. One has made great strides without doing such research, though she is planning to add staff to conduct it eventually. Another expresses caution about linking user-centered design so closely to innovation. And another has found that a large online panel of customers and non-customers has been what has really revolutionized their contribution to the business [14].

Session participants will debate the importance of conducting ethnographic research to moving UX into a position of corporate influence.

Towards resolution of the conflicting recommendations

Interestingly, each side of each pair of conflicting recommendations receives some degree of support from different combinations of session participants. But where does that leave those trying to learn from others' experiences?

What accounts for these different perspectives? Characteristics of the companies? Characteristics of the session participants? Other elements of the approaches taken by the session participants? Serendipity?

Session participants will discuss their views on these issues, describe additional elements of their approaches and contexts, and critique models that have been proposed (e.g., [18]) to help resolve recommendation conflicts and to provide new recommendations regarding moving UX into a position of corporate influence.

Session participants

As stated earlier, all session participants have been selected because they are in key senior UX management positions at companies where they have played major roles in moving UX into positions of significant and rapidly increasing corporate influence. Plus, their backgrounds, places of work, and approaches are highly varied.

Richard I Anderson (organizer, moderator) is a user experience management consultant focused on helping move UX into a position of corporate influence. He has more than 20 years of experience in the world of user experience (or a subset or variation thereof), and has held UX management positions in consulting and product development companies. For those and many other companies as well as many countries, he has extended the reach and effectiveness of multi-disciplinary, user-centered design practices. Richard has organized and moderated numerous professional meeting sessions in the past, including CHI conference sessions and dozens of BayCHI sessions; as CHI 2004 Panels Co-Chair, he spearheaded the move to *require* that the sessions be designed to be especially engaging, a move which has led to the sessions being renamed as "interactive sessions."

Jeremy Ashley is Vice President of Applications User Experience at Oracle. He has worked in various user experience capacities at Oracle for over 10 years. He previously worked for Taligent and Apple Computer. He has a bachelor of arts in industrial design from the Glasgow School of Art and a master of design in computer-related design from the Royal College of Art in London.

Tobias Herrmann is head of Team User Experience within mobilkom austria, Austria's largest telecom and mobile service-providing company. He implemented a matrix-organized team that today covers all fields of user experience activities, e.g., "classical" usability/user experience consultancy, usability/workflow engineering, and maintenance of mobilkom austria's online customer panel. In 2006, one major focus is the training and integration process of user experience managers within the subsidiary companies Mobiltel (Bulgaria), Vipnet (Croatia), and Si.mobil (Slovenia). This will be Herrmann's first appearance on a CHI conference stage.

Justin Miller is Senior Director of Product for Europe, eBay. He oversees a team across 11 countries focused on driving business success by creating a positive, fun and easy-to-use website for eBay's global community of users. Prior to this role, Miller led the company's Global User Experience and Design organization. Prior to joining eBay in 2001, Justin managed the user interface team at Webvan Group, one of the first online grocery stores. During his three-year tenure, he formed Webvan's product management and user interface group, which helped Webvan garner its share of accolades, including Gomez Advisors' "Best Website in an Online Grocery Category" award.

Jim Nieters is senior leader of a User Experience Design team at Cisco in the USA. He has been a usability and user experience design practitioner for more than 15 years, and has been a leader and management consultant for eight of those years. His Cisco User Experience Design Group can track over \$200 Million in revenue increases each year because of their work, with a total of over \$2.5 Billion. This will be Nieter's first appearance on a CHI conference stage.

Shauna Sampson Eves joined Blue Shield of California in January 2005 as the Director of User Experience. Ms. Sampson Eves is responsible for the brand execution and User Experience Design of Blue Shield of California's award-winning web portal and digital customer touch points. (Blue Shield of California is one of the state's largest health plans with 3.3 million members.) Since joining Blue Shield of California, Ms. Sampson Eves has assembled a best-in-class User Experience Design team to deliver on Blue Shield's brand and self-service strategy. Ms. Sampson Eves previously served as Director, Customer Experience Design at Scient Corporation and has spent her career leading customer experience design and marketing teams supporting fortune 50 companies such as Wal-Mart, McKesson, Johnson & Johnson, Morgan Stanley, Wells-Fargo, Well Point Health Networks, Duke Energy, and Microsoft/MSNBC. This will be Sampson Eves' first appearance on a CHI conference stage.

Secil Tabli Watson is a Senior Vice President managing a 50-person customer experience group at wells Fargo.com. Her team is responsible for the effectiveness of customer communications and customer experience across the online channel and online servicing (phone and email). Her team consists of experience strategists, market researchers, user researchers, UX designers, information architects and content managers. She loves systems thinking and applying UX tools to business problems. She has an MBA from Wharton in Finance and a BA from Cornell University in Government and Economics. She's been at her position at Wells Fargo for 4 years. Prior to that, she was management consultant for Fortune 500 companies in telecom, banking and healthcare. She has also managed a financial services vertical in the e-learning industry. This will be Watson's first appearance on a CHI conference stage.

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Session format

The session will consist mostly of a series of short debates among different combinations of the session participants, with input and support provided by the audience throughout. Each debate will end with hints of key elements of a resolution of the conflicting perspectives, with the concluding segment of the session pulling together those elements into a resolution and into new and improved recommendations.

This session will be fully designed and choreographed with the full group's participation in advance of the conference. Richard Anderson will lead this process and will moderate activities on stage as well as in the audience (see below).

Participants will be seated on stage in random order to begin the session for brief introductions, but then prior to addressing each of the several conflicting recommendations, participants will rise and move to one side of the stage or the other, with each side corresponding to one side of the conflicting recommendations. Hence, the side a participant moves to will reflect his or her perspective on the issue -- i.e., which side he or she agrees with.

(In a couple of cases, a couple of participants are likely to be "on the fence" on an issue, and will move to a central spot between the two sides referenced above. In one case, I believe there will be three "sides," so the central spot will serve both situations.)

The movement is important to highlight the fact that different participants side with each other on different issues; that is, it is NOT the case that the same group of people will always be together on one side of the stage. Hence, there will always be a shuffling around of participants leading into the debate on each issue.

The movement is also important to facilitate audience members identifying with the side of the stage (i.e., issue) they lean towards, facilitating communication of support between audience members and whichever side they favor. Indeed, before each debate, audience members will be polled regarding their side of the issue and then asked to be ready to offer input as each debate proceeds. Richard will facilitate all this to ensure audience participation; all session participants will be poised to interact with audience members offering their input. (Ideally, the audience members would themselves move to different sides of the seating area, but, of course, that would be a tad chaotic!)

Table and/or chair positioning will need to accommodate the movement on stage (see below).

Logistics

A-V requirements include slide projection via a laptop computer. Lapel microphones for all participants would be ideal.

Tables and/or chairs will need to be positioned on two sides of the stage and in the center to accommodate the movement of session participants described above. Positioning should be at an angle which permits debaters to face each other (to some extent) while still facing the audience (to some extent). The number of tables and chairs in each location will need to accommodate the maximum number of participants who will move those locations; we'll determine these numbers precisely to provide input to the stagehands prior to stage setup.